

HOW TO APPROVE A PROPOSAL

This guide outlines the steps to approve a Proposal through CourseLeaf.
For additional information on CM, please click [here](#).

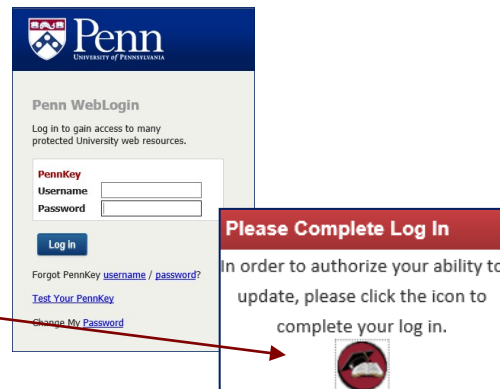
Email Notice

- CM generates different types of alert emails based on the nature of the notification. Some are used as an "FYI", while others are a prompt to take action on a proposal.
- The link located in the email directs the user to the approval page for the proposal.



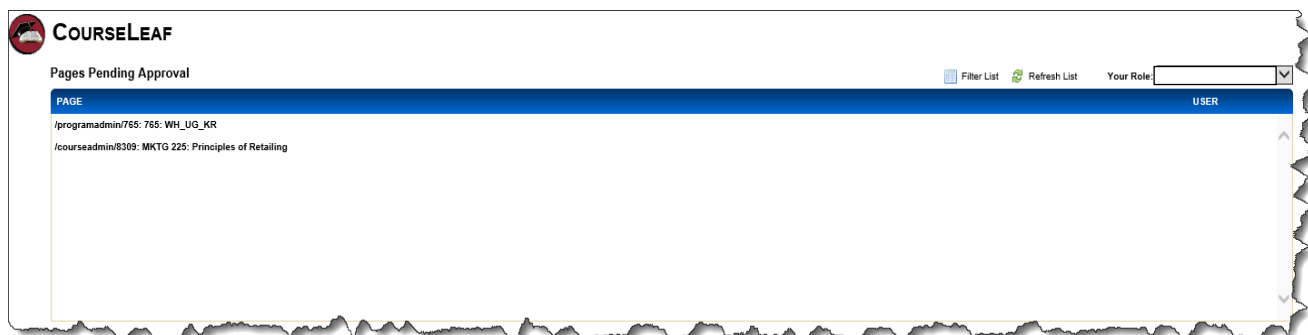
Approve a Proposal - Login

- Clicking the above link will generate a log in box.
- Enter your **Username** and **Password**.
- Click on **[Log in]**.
- Click on the **Log In** icon.



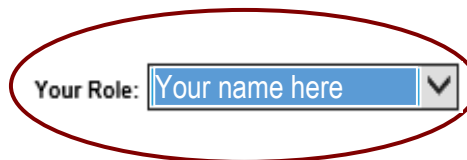
Page Pending Approval

- After clicking the hyperlink and logging in, the "Pages Pending Approval" form displays the queue for the applicable role, and the correct proposal is displayed by default.



Accessing Role Approvals without an Email Link

- Navigate to the *CourseLeaf* [“Pending Approval”](#) page
- Since this landing page will not be specific to the current proposal, you must select your appropriate role from the “Your Role” dropdown, followed by the appropriate proposal.
- FYI: If you have multiple roles in your School/Center, you will need to select which role is needed for approval.
- Once you have selected the appropriate proposal, the remaining steps are the same as when accessing a proposal via email link.



Page Review

- “Page Review” will display your proposal’s full detail.



Add Comment

- There is an option to add a comment by clicking on **[Add Comment]**.
- Comments added will be shown at the very bottom of the proposal under **Reviewer Comments**.



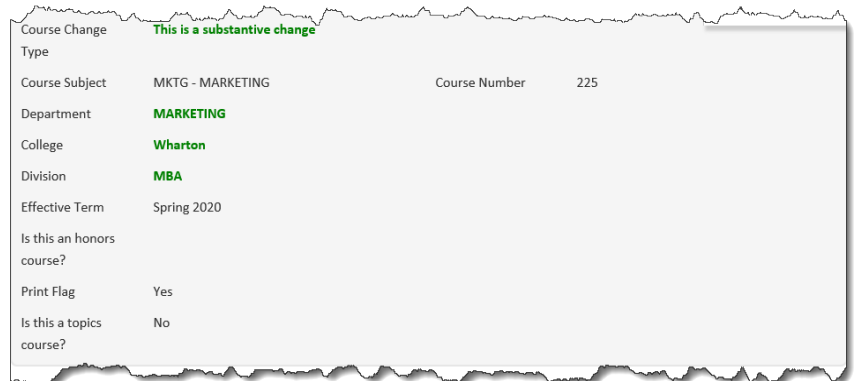
Workflow Status

- The workflow process varies by each School and sometimes divisions within Schools. At a minimum, all proposals will be reviewed by a School administrator and the Office of the University Registrar.
- Some Schools’ processes are complex and the workflow consists of more steps. For example, a School may require a review by a committee, while others may require faculty sign-off. Because each School is implementing its own configuration, please consult with your CM administrator for complete details.



Review a Proposal

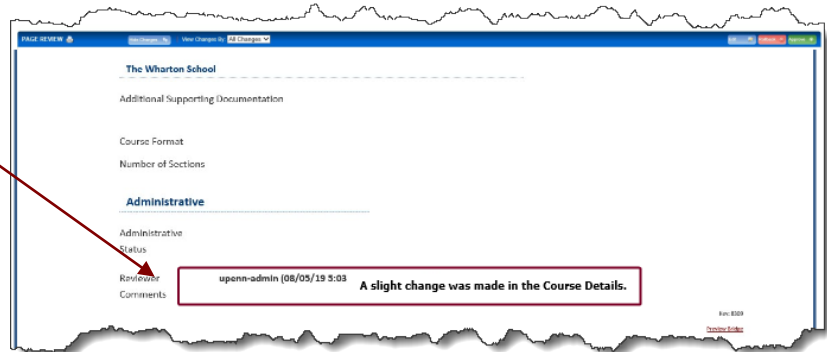
- The entire proposal is available for review by scrolling down on the current page before making any edits.
- New information displays as **green** text.
- Removed information displays as **red** text with the strikethrough (~~manager~~).



Course Change Type	This is a substantive change		
Course Subject	MKTG - MARKETING	Course Number	225
Department	MARKETING		
College	Wharton		
Division	MBA		
Effective Term	Spring 2020		
Is this an honors course?			
Print Flag	Yes		
Is this a topics course?	No		

Reviewer Comments

- This proposal illustrates that a comment has been added.



Reviewer Comments

upenn-admin (08/05/19 3:03) **A slight change was made in the Course Details.**

Approver Decisions

- After reviewing the necessary proposal, the approver will make the decision to:
 - **Edit:** The Approver will scroll through the proposal to edit as needed. Edits by Approver are limited to typos, minor text revisions, etc.
 - **Rollback:** A proposal in the review process can be rolled back to any of the previous workflow steps, including the submitter. A comment is required when submitting a rollback.
 - **Approve:** Once review is complete, the Approver can approve the proposal and advance it to the next step within the workflow.

